CPABC Financial Literacy Program

New Volunteer Walkthrough: Presenting Your First Session

Fall/Winter 2024

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Contact Information

Chartered Professional Accountants of British Columbia
finlit@bccpa.ca
604-200-2843
#800 – 555 West Hastings St
Vancouver, BC, V6B 4N6

1. Welcome to the CPA Financial Literacy Program!

The CPA Financial Literacy Program delivers free, unbiased, objective financial education to communities across Canada. Our award-winning program aims to give participants the knowledge and confidence needed to make smart financial choices and accomplish their life goals.

By registering as a CPABC Financial Literacy volunteer, you're helping us meet the growing demand for financial education in British Columbia and the Yukon.

Thank you for joining us! In this guide you'll find information to start your volunteer journey.

2. How do we match you with volunteer opportunities?

CPABC's Financial Literacy system connects volunteers like you to financial literacy host organizations in communities across BC and the Yukon. We do this by matching volunteers and hosts based on specific preferences of both parties including:

- Preferred audience type (schools, youth, seniors, adults, etc.)
- Preferred session format (in-person, online, or hybrid. Online sessions can be presented by any volunteer regardless of location preferences.)
- Preferred volunteering region(s)/location(s)
- Preferred language(s)

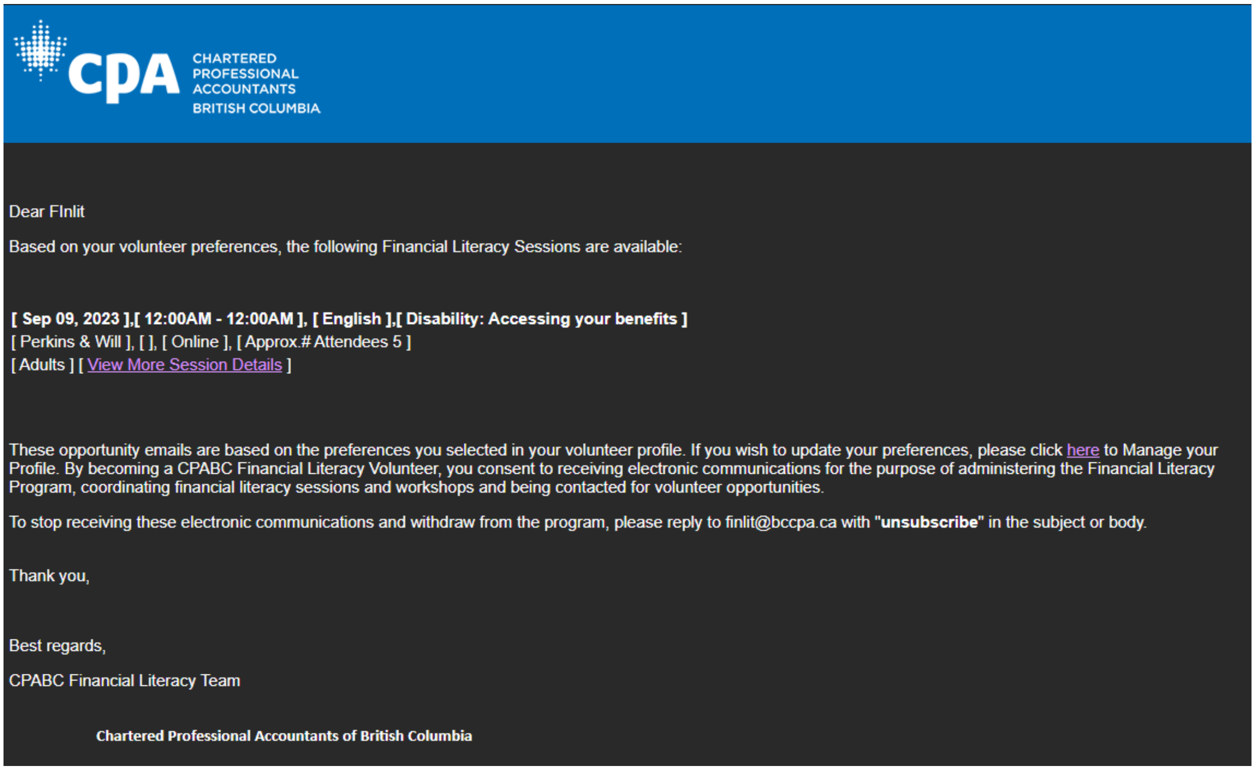
If at any time you would like to change or update your volunteer preferences, you can!

- Log in to the Volunteer Portal
- Under Financial Literacy, click the "Manage Volunteer Profile" (under "Volunteer Portal")
- Select your new preferences
- After making your changes, click "Finish" to save them

Volunteer opportunity emails

Volunteer opportunities that match your preferences are emailed to you on the 7th and the 21st of each month. If you'd like to present a session, simply click "View More

Session Details" under your desired session (this will take you to the volunteer portal), and then click "Register Myself".



CHARTERED PROFESSIONAL ACCOUNTANTS BRITISH COLUMBIA

Dear FInlit

Based on your volunteer preferences, the following Financial Literacy Sessions are available:

[Sep 09, 2023],[12:00AM - 12:00AM], [English],[Disability: Accessing your benefits]
[Perkins & Will], [ ], [Online], [Approx.# Attendees 5]
[Adults] [View More Session Details]

These opportunity emails are based on the preferences you selected in your volunteer profile. If you wish to update your preferences, please click here to Manage your Profile. By becoming a CPABC Financial Literacy Volunteer, you consent to receiving electronic communications for the purpose of administering the Financial Literacy Program, coordinating financial literacy sessions and workshops and being contacted for volunteer opportunities.

To stop receiving these electronic communications and withdraw from the program, please reply to finlit@bccpa.ca with "**unsubscribe**" in the subject or body.

Thank you,

Best regards,

CPABC Financial Literacy Team

Chartered Professional Accountants of British Columbia

An example of a Volunteer Opportunity email

Not receiving volunteer opportunity emails?

If you are not receiving any volunteer opportunity emails, this is because no session requests have been made that match your preferences. Consider expanding your preferences by selecting additional audience types or locations under "Manage Volunteer Profile" in the volunteer portal. If you prefer to only deliver in-person sessions, consider presenting online sessions as well, and vice-versa.

View all available volunteer opportunities

Select "Available Volunteer Opportunities" in the portal to view a list of all current volunteer opportunities. This list is all-encompassing and is not tailored to your own volunteer preferences. To register to present a session click "Register" and then "Register Myself".

The CPABC Financial Literacy team may occasionally contact you outside of the scheduled emails to inform you of volunteer opportunities.

Connecting with a host organization

After registering to present a financial literacy session, you'll be connected and introduced to the host organization contact via email. Both parties' contact information will be shared as well as logistics for the session such as day and time, location, format, approximate number of attendees, and language.

Cancelling or rescheduling a session

If you need to cancel or reschedule a session, please email finlit@bccpa.ca. We will inform the host and work to find a replacement volunteer or determine an alternate date for the session.

3. Volunteer and host responsibilities

Volunteers and hosts have different responsibilities before, during, and after a session. The tables below outline the steps both parties are expected to follow to prepare for, present, and self-report a session.

In-person sessions

Host responsibilities	Volunteer responsibilities
Before the session	
Inform the volunteer and CPABC of scheduling changes or cancellations related to the session	**Inform the host and CPABC of any scheduling changes or cancellations related to the session**
Inform the volunteer of any special instructions (parking, building entrance, room number, etc.)	**Learn more about the session participants and make any adjustments to the presentation**
Secure a space for the session and ensure it can accommodate the number of participants	**Download session materials and ensure they are ready to be presented**
Promote the session and manage attendance (RSVP or drop-in)	
Download participant materials	**Make any desired adjustments to the presentation content and/or speaking notes**
Day of the session	
Provide any required equipment for the presentation (projector, monitor, computer, etc.)	**Arrive on time with sufficient time for set up**
Distribute participant materials, including session evaluation forms (or distribute in advance)	**Present the session in the provided space and in a professional manner**
After the session	
Collect completed session evaluation forms and send them via email to finlit@bccpa.ca	**If the session was organized outside the volunteer portal, self-report the session**

Virtual sessions

Host responsibilities	Volunteer responsibilities
Before the session	
Inform the volunteer and CPABC of any scheduling changes or cancellations	**Inform the host and CPABC of scheduling changes or cancellations related to the session**
Set up the online meeting using your preferred platform	**Learn more about the session participants and make any adjustments to the presentation**
Send the volunteer and participants the link to join the session	**Download session materials and ensure they are ready to be presented**
Promote the session and manage attendance (RSVP or drop-in)	
Download participant materials	**Make any desired adjustments to the presentation content and/or speaking notes**
Day of the session	
Distribute participant materials, including session evaluation forms (or distribute in advance)	**Join the session with enough time to prepare and ensure any technical issues are sorted**
Launch session with enough time to prepare and address any technical issues. Consider making the volunteer a meeting co-host and testing speakers and screen sharing	**Present the session in a professional manner**
After the session	
Collect completed session evaluation forms and send them via email to finlit@bccpa.ca	**If the session was organized outside the volunteer portal, self-report the session**

4. Seeking out your own volunteer opportunities

Maybe you know of an organization that is promoting financial literacy to their staff, or perhaps your child's school is looking to present a session to students. Whatever the case, feel free to get in touch with an organization and set up a session on your own!

Important: If you choose to organize sessions on your own, we ask that you **self-report** them. Please see page 10 to learn more about self-reporting.

5. How CPABC can help

CPABC's role is to support financial literacy volunteers and host organizations so that they can enjoy a positive and fulfilling experience. Our team is available to help you with questions, concerns, or ideas.

Additionally, we have plenty of financial literacy resources to help you get the most out of your volunteer experience and discover new opportunities to learn. You can also attend any of CPABC's upcoming sessions, networking events, and online webinars.

6. Downloading session materials

Before presenting a session, you'll need to download the session materials. These typically include a PowerPoint presentation (with speaking notes), facilitators guide, evaluation forms, and more. As reference, they will also include participant materials, but the host is responsible for downloading and distributing these.

To download session materials, click "Access Session Material" in the Volunteer Portal, find your desired session using the search tool, and then click "Download Session Materials (CPAs Only)". At this point, you may need to sign in before continuing.

Making changes to the content

If you feel any presentation content or speaking notes should be altered to better match the needs of your audience or to better align with your presentation style, feel free to make those changes. Alterations should be aligned with CPA professional standards and communicated to CPABC and the host before the presentation.

7. Tips for presenting financial literacy sessions

Presenting your first financial literacy session can be intimidating. If you have any concerns or questions, you can email us at finlit@bccpa.ca and we'll do our best to help. But first, read these helpful tips:

- For your first session, choose a topic that you are passionate about. This will help you feel more comfortable with the subject matter and will help the audience better connect with you.
- Have your presentation materials organized and prepared in advance. This will help you to avoid scrambling to get organized on the day of your session.
- Keep in touch with your session's host contact and be sure to update them on any notable changes or updates regarding your presentation.
- Practice your presentation beforehand if public speaking makes you nervous.
- Whether in-person or online, try to make your presentation as interactive and engaging as you can while encouraging participation.
- Personalize the content where you can and give examples from your own life or career. This can help make your presentation more memorable to the audience.
- Remember that practice makes perfect. The more sessions you present, the easier it will be and the more skilled a presenter you'll become.
- Be open to feedback and use it to improve your skills.
- Never hesitate to reach out to CPABC for guidance and support.
- Have fun!

Presenting to challenging audiences

Some audiences can be more challenging – to help you prepare, here are some tips:

Youth audiences

- It can be difficult to make youth feel engaged, so it's a good idea to make your presentation as interactive as possible – don't be afraid to try new things.
- Encouraging questions, even ones that are slightly off topic, can be a great way to get youth to open up and share their own ideas.
- Pause after each topic and ask if there are any questions.
- Try putting participants into small groups to discuss a topic, then have them share their ideas.
- Elementary school audiences will have more difficulty sitting still and paying attention, so try to avoid long stretches without some kind of activity or interactive element. Interactive activities are often included in the session downloadable materials.

- Consider asking for one or two volunteers to be your “helpers” throughout the session. This is a great way to get elementary students more engaged.
- At the end of the session, ask the audience to share one thing they remember from the session or one thing they’ll take away from it.

Low to moderate-income audiences

- At the beginning of your presentation, establish that money is a sensitive topic for many and that it is not your intent to offend or say something inappropriate, arrogant, or emotionally impactful. This can help to avoid conflict or negative feelings towards your presentation.
- Encourage participation and share your own experiences, including times where you were facing financial hardship and how you overcame it.
- Communicate that financial problems do not reflect someone’s character, and that they should avoid comparing themselves to others who they view as more wealthy or successful.
- Avoid using examples that may be out of reach for low to moderate-income audiences, such as mentioning expensive brand names or big purchases such as a new car or an expensive vacation.
- Try and reframe conversations or stories about losing money to instead emphasize ways in which money can be saved in that situation.
- Encourage participants to celebrate small financial victories and stress the importance of these small wins in the long run as they continue to add up.
- Encourage participants to focus on what makes them happy and to look to the future, because reaching a better place financially is not something that happens overnight.

8. Self-reporting sessions

If you organize a financial literacy session on your own outside of the CPABC volunteer portal, please **self-report** that session. By self-reporting, you are informing CPABC Financial Literacy that the session is taking place. Self-reporting is important in CPABC's goal to capture ALL data regarding financial literacy sessions.

Self-reporting is a quick and easy process. **We ask that you self-report each session you've organized on your own individually**. To self-report, simply click "Self-Report a Session" in the Volunteer Portal and fill out the required fields. Once you've entered the correct information for your session, click "Submit Request" at the bottom of your screen. You will receive a confirmation email and your self-report will be processed within two business days.

After you successfully self-report a session, it will appear under "Past Sessions" in the "My Presented Sessions" tab. Here you can also view your upcoming and cancelled sessions.

Providing us feedback

If at any time you have feedback regarding CPABC's Financial Literacy program, you can send an email to finlit@bccpa.ca. The Financial Literacy team is always looking to hear from volunteers about their experiences to make improvements to the program.

9. Frequently asked questions

Do I need to meet any requirements for time commitment or a minimum number of sessions?

There are no specific time commitments or minimum number of sessions you are required to present.

What should I do if I need to reschedule or cancel a session I've signed up to present?

Please email finlit@bccpa.ca and let us know. We will inform the host and work to find a replacement volunteer or determine an alternate date for the session.

A host organization wants to cancel/reschedule my session, what should I do?

If the host wants to cancel, no action is required on your part. If the host wants to reschedule, discuss with them an alternative date if possible. We will also assist to make alternative arrangements.

What should I do if I'm not getting matched with many sessions?

Consider expanding your volunteer preferences by selecting additional audience types or locations under "Manage Volunteer Profile" in the volunteer portal. If you prefer to only deliver in-person sessions, consider presenting online sessions as well, and vice-versa.

Can I set up my own Financial Literacy sessions with someone I know?

Absolutely! If you know someone who would like you to present a financial literacy session, please set this up and make sure to **self-report** each session afterward.

I'd like to withdraw from the Financial Literacy Program, what should I do?

If you wish to withdraw or take a temporary leave from volunteering, you can do so by emailing finlit@bccpa.ca. If you withdraw voluntarily, you can come back and continue volunteering at any time.